wvOASIS Vendor Self Service

Registration Quick Start Guide Release 3.9.0.2

July 14, 2020

Revision 2



ATTENTION

If you are applying for the WV CARES Act Small Business Grant Program, please read this.

<u>Use Internet Explorer when accessing Vendor Self</u> Service (VSS).

Everything in VSS is case sensitive.

EIN/TIN/ITIN/FEIN are your tax identification number.

If you are creating a new account, you only need to complete the fields with a red asterisk *. You do not need to complete disclosures, commodities, or service areas.

Please provide an accurate payment address in your account.

Grant applicants do <u>NOT</u> need to pay the \$125 registration fee. Grant applicants should choose the "Pay Fee Later" button to continue the enrollment process.

Your account status may say INACTIVE even if you have completed all the steps.

You should fax (304-558-9173) or email (vendoradmin@wv.gov) an updated W9.

Grant applicants will use your wvOASIS Vendor number to access <u>grants.wv.gov</u> to apply. Be sure to use the exact number including the zeros.

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Overview

This guide has been developed to provide an overview of an account setup in the wvOASIS Vendor Self Service (VSS) application. You should follow this guide if:

You have an **existing** payee/vendor account with the State of West Virginia and wish to **activate your account on this website.** If you have more than one payee/vendor account and cannot activate your desired account, please contact the Help Desk.

<u>OR</u>

You are a <u>new</u> payee/vendor that is interested in conducting business with the State of West Virginia for the first time and need <u>to create a new payee/vendor account.</u>

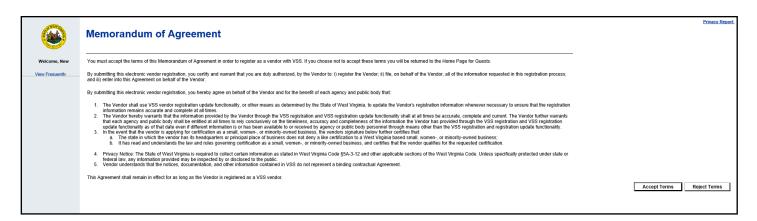
Note: Please remember your user ID and password when you create them as you will need them to log back into the Advantage Vendor Self Service (VSS) application. Both the user ID and password are case sensitive.

Section 1: Look to See If a Payee/Vendor Account Exists in VSS

Step 1.1: Click the "Register" button to start the Vendor Registration process.



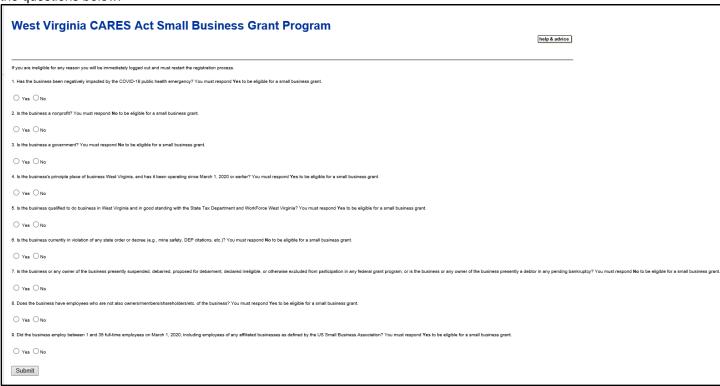
Step 1.2: Carefully read the "Memorandum of Agreement" and then click on the "Accept Terms" button if you agree with the terms.



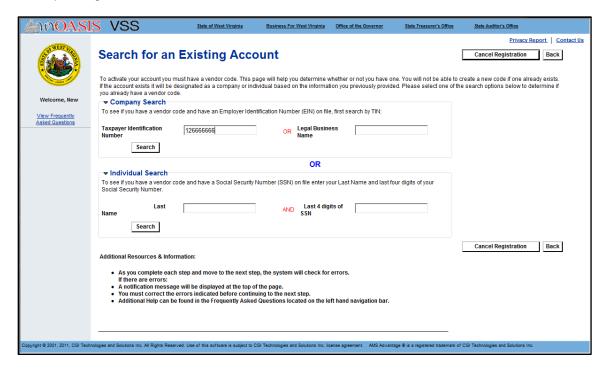
Step 1.3: The Registration Tips page lists the information that you should have available before beginning a new registration. You can click on the "Next" button to continue.



Note: Only businesses applying to the West Virginia CARES Act Small Business Grant Program must submit answers to the questions below.



Step 1.4: This search page helps you determine if you have an existing vendor account. To initiate the search process, you can choose to search by Company or by Individual depending on your type of business. The distinction between these two is that an Individual's Taxpayer Identification Number is his/her Social Security Number (SSN) or alternative identifier whereas a Company's Taxpayer Identification is generally their Federal Employer Identification Number (FEIN). Enter the pertinent information in either the Company Search or Individual Search section and then click on the corresponding Search button.



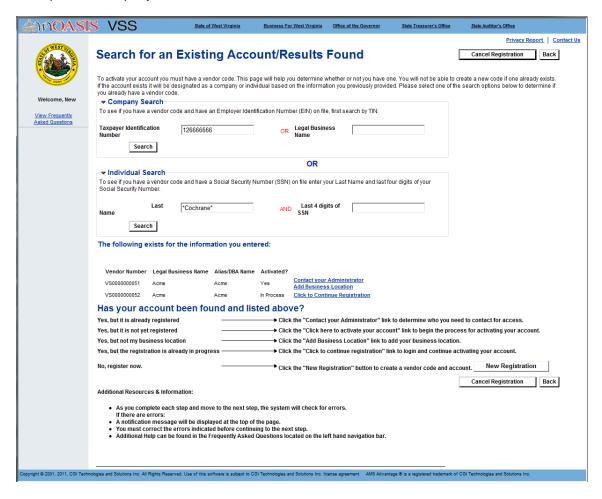
Based on the search results:

- If your account has been found, please continue to steps in Section 2 below.
- If your account has NOT been found and you believe you have an existing account, please try again, and read the hints displayed on the page above regarding the use of wildcards to help in your search. If you still cannot find your account, then please contact the Help Desk for assistance.
- If your account has NOT been found and you are a new vendor that is interested in conducting business with the State of West Virginia, please skip Section 2 below, and proceed directly to Section 3.

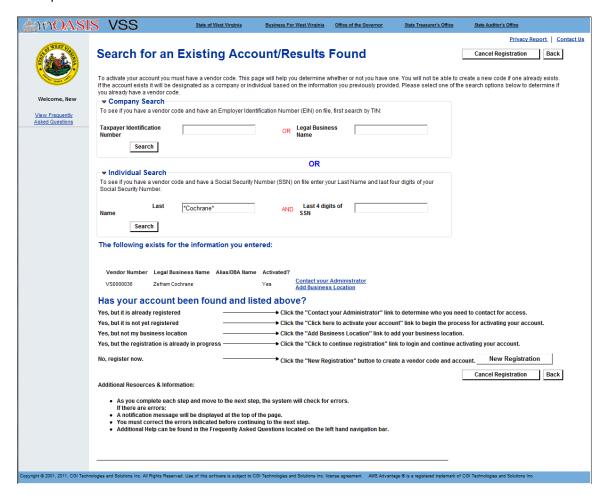
Section 2: An Existing Account HAS BEEN FOUND in VSS

In the examples below, an EXISTING ACCOUNT has been found:

Example 1: A company account is found



Example 2: An individual account is found



When an existing account is found, you will be presented with one of the links described below. Select the link that best addresses your needs. Most likely, you will select the link described in Step 2.3 below.

Step 2.1: "Contact your Administrator" link

- Explanation A vendor administrator has already been established for this account.
- Action Click on this link to display the vendor administrator contact information. Contact this administrator for assistance with accessing this account.

Step 2.2: "Click to Continue Activation" link

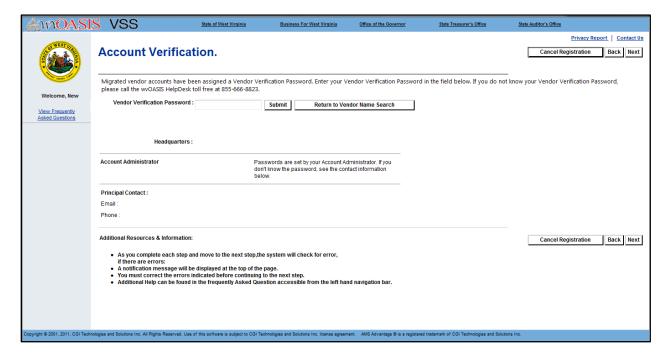
- Explanation A user is in the process of creating an account but has not completed the registration. He/she can return at a later date to complete the process.
- Action Click on this link to continue with the registration if you are the user that started the registration.
 Otherwise, contact the Help Desk for assistance.

Step 2.3: "Click here to activate your account" link

- Explanation The company has done business previously with the State of West Virginia, but has not yet established an account in VSS. Click on the link to create a user ID for this account.
- Action Click on this link to create a user ID for the account.

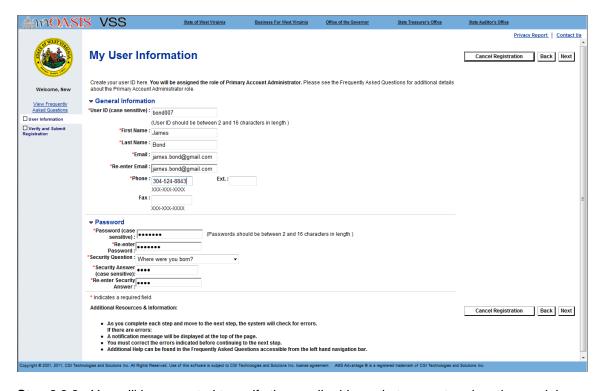
Step 2.3.1: The Account Verification page will prompt you to enter information to authenticate you as a valid user for this account. Enter the requested information and click the "Next" button to continue.

Note: Migrated vendor accounts have been assigned a *Vendor Verification Password*. Enter your Vendor Verification Password in the space provided. If you do not know your Vendor Verification Password, please call the wvOASIS HelpDesk at 304-558-6708 or toll free at 855-666-8823, Monday-Friday 7:00 AM to 5:00 PM.

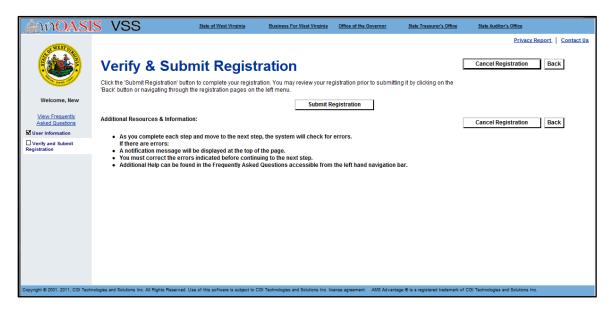


Step 2.3.2: Once your information has been verified by the system you will see the "My User Information" page. Complete all of the fields indicated with a red asterisk and click on the "Next" button to continue.

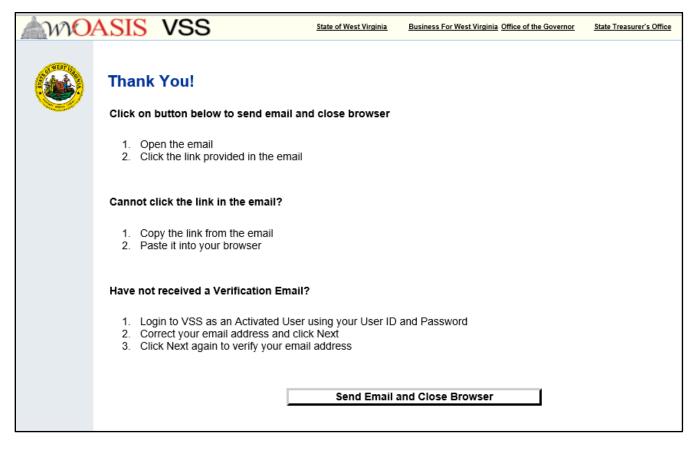
Note: Please remember your user ID and password in order to log into the VSS application again.



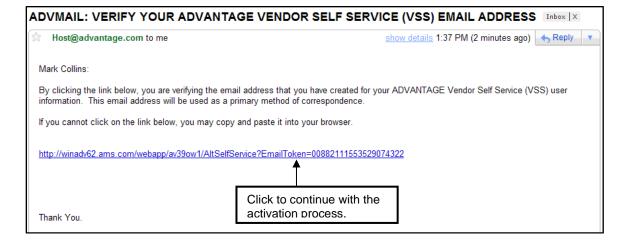
Step 2.3.3: You will be prompted to verify the email address that you entered on the previous page. Confirm that your email address is correct and then click the "Next" button to continue. A confirmation email will then be sent your email address.



Step 2.3.4: Review the information on the "Thank You" page and then click the "**Send Email and Close Browser**" button to exit from the VSS application. You will receive an email from VSS to continue with your registration.

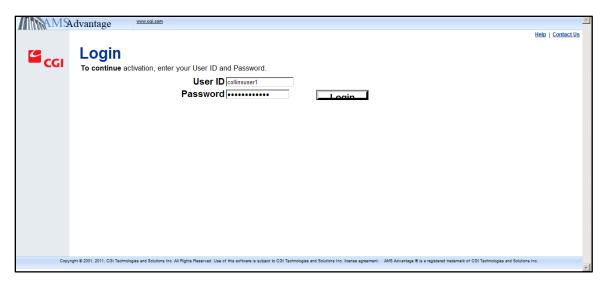


Step 2.3.5: Open your email and click on the link provided to continue with your registration.



Step 2.3.6: After you click on the link, you will be transitioned to a VSS login page. Enter the user ID and password that you created earlier and click "Login". Remember that both the user ID and password are case sensitive.

Note: Do not bookmark this page. You will be logging in from the VSS home page once your registration is complete.

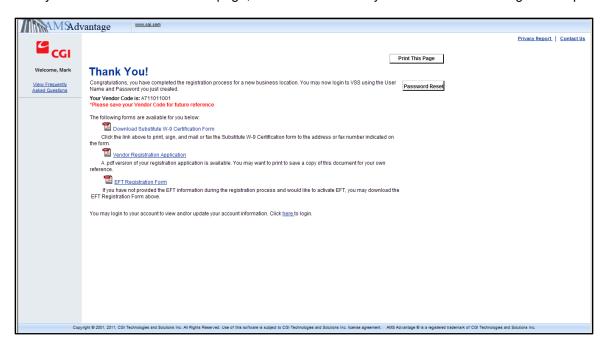


Step 2.3.7: Click on the "Submit Registration" button to complete your registration.

Note: After you complete your registration, you will be able to log in to your account to review and update the information that is on file for your account, if needed.



Next you will see the "Thank You" page, which indicates that you have finished the registration process.



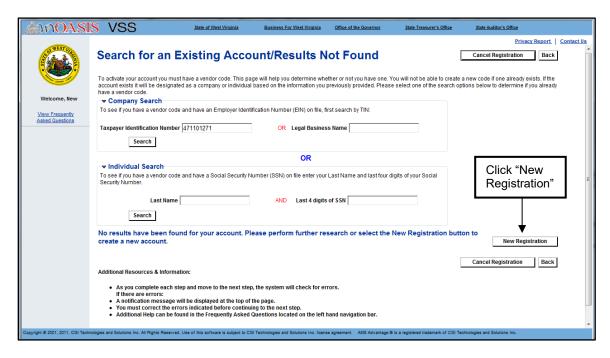
You have now completed the registration application and may log in to VSS using your user ID and password (via the web site: www.wvoasis.gov). Please note that your user ID and password are both case sensitive.

Note: You can skip the rest of this Quick Start Guide since you have completed the registration application.

Section 3: Your Account HAS NOT BEEN FOUND

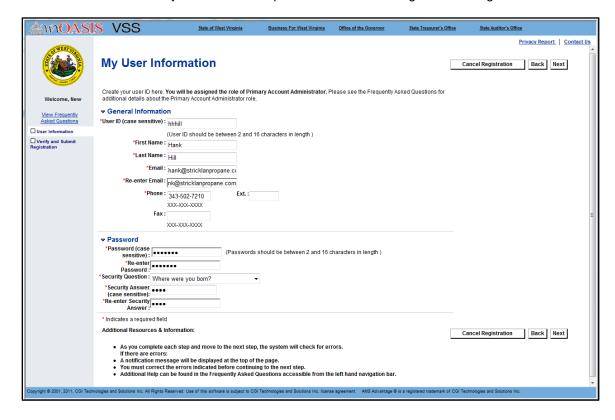
This section is a continuation from Section 1.

In the example below, no existing account has been found. You can click on the "New Registration" button to create a new vendor account.

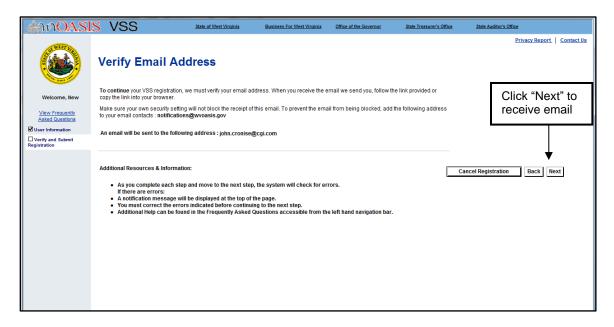


Step 3.1: Complete all the fields indicated with an asterisk and click on the "Next" button to continue.

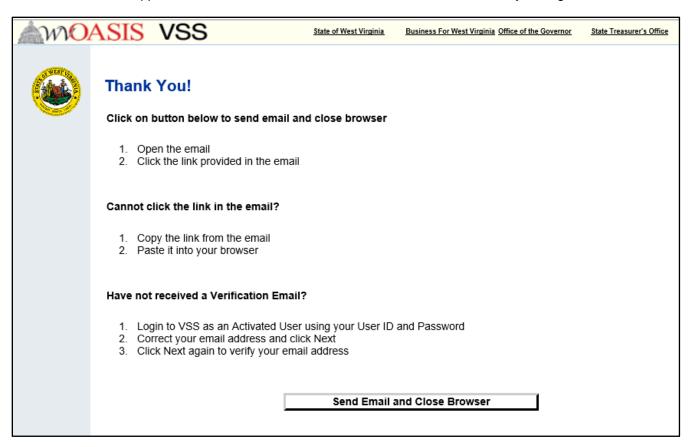
Note: Please remember your user ID and password in order to log in to VSS again.



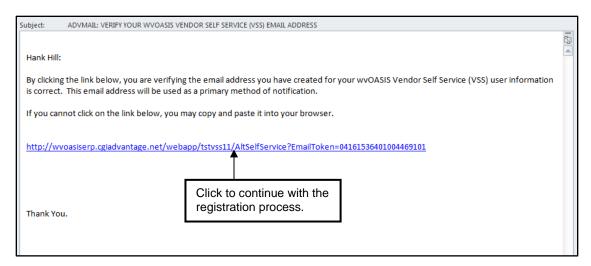
Step 3.2: You will be prompted to verify the email address that you entered on the previous page. Confirm that your email address is correct and then click the "Next" button to continue. A confirmation email will then be sent to your email address. NOTE: You must the "Next" and then the "Send Email and Close Browser" button to receive the email.



Step 3.3: Review the information on the "Thank You" page and then click the "**Send Email and Close Browser**" button to exit from the VSS application. You will receive an email from VSS to continue with your registration.

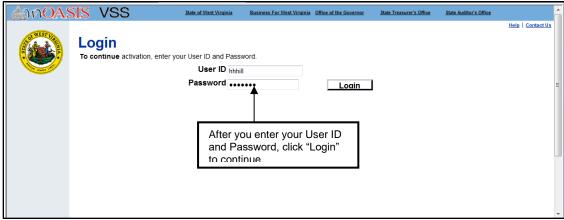


Step 3.4: Open your email and click on the link provided to continue with the registration process.



Step 3.5: After you click on the link you will be transitioned to a VSS log in page. Enter the user ID and password that you created earlier and click "Login." Remember that both the user ID and password are case sensitive.

Note: Do not bookmark this page. You will be logging in from the VSS home page once your registration is complete.



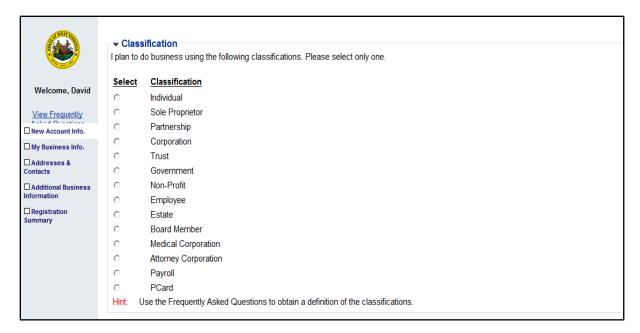
NOTE: WHEN REGISTERING, YOU NEED TO COMPLETE ALL FIELDS WITH A RED ASTERISK*.

Step 3.6: Select the TIN Type for your account and then select the Classification that applies to your business or individual account. Click "Next" to continue.

Note: If you select the first TIN Type option be sure to select whether you have a SSN, ITIN, or ATIN.

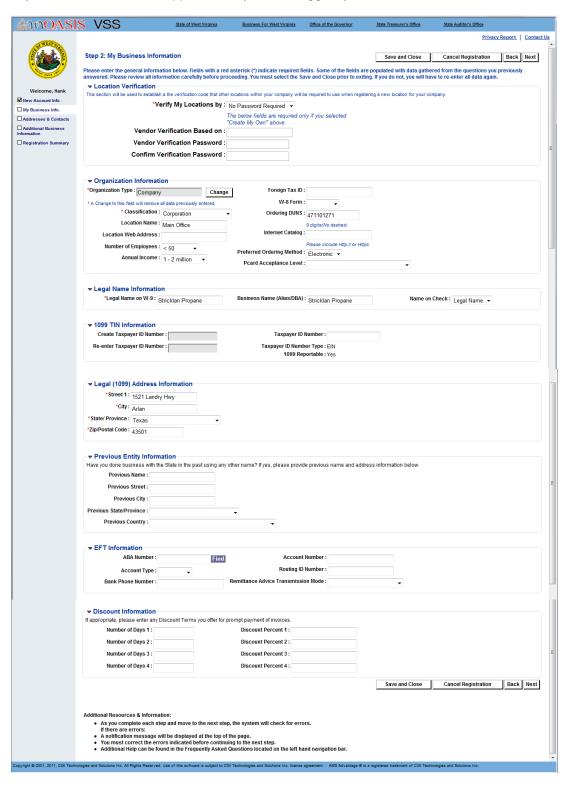


Classification: Select the Classification that applies.

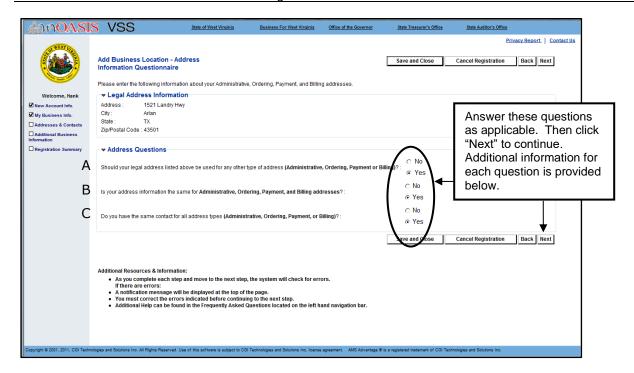


If you have any issues with how you should answer any of these questions, click the "Submit Question" button at the bottom of the page. After you submit your question, click "Save and Close" to exit the application. VSS will save the information that you already entered and will remember your progress. Once you receive an answer to your question you can log back in, and VSS will return you to the place where you left off.

Step 3.7: The next step is the "My Business Information" page. A few fields on this page will be pre-populated by answers you provided on the previous page. The fields with red asterisks (*) are required to move forward. However, if any of the other fields are applicable to you, we suggest you fill them in.



Step 3.8: You entered your legal address in the previous step. In this step, the system will ask you questions regarding four additional types of addresses. VSS collects an address for administrative correspondence, an address for ordering from you, an address for sending payments to you, and an optional address for billing you if you owe fees or other payments. You can choose to specify the same address or different addresses for each of these four address types.

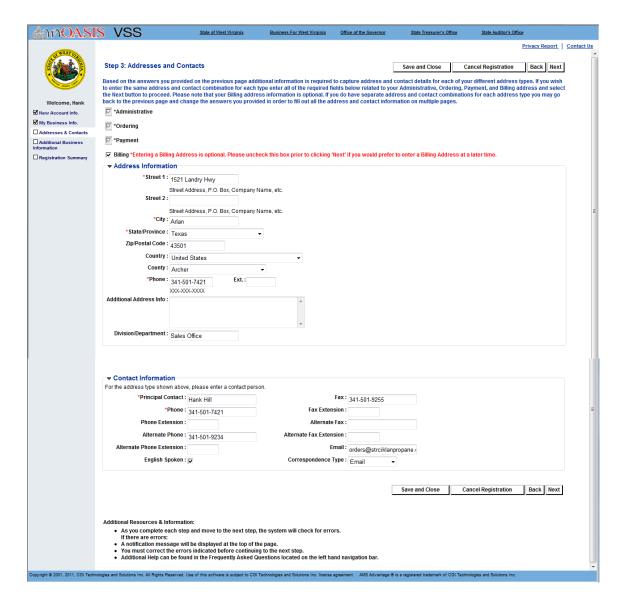


The three address questions above are labeled A, B, and C in this example. Here is a short explanation for each question.

- A: If your Legal Address is the same address as any one of the additional four address types (Administrative, Ordering, Payment, and Billing) then choose "Yes" on A. Otherwise, choose "No."
- B: Regardless if you choose "Yes" or "No" on A above, if your Administrative, Ordering, Payment, and Billing addresses are all the same address, choose "Yes" on B. Otherwise, choose "No."
- C: If you want a single contact person for all four address types, choose "Yes" on C. Otherwise, choose "No."

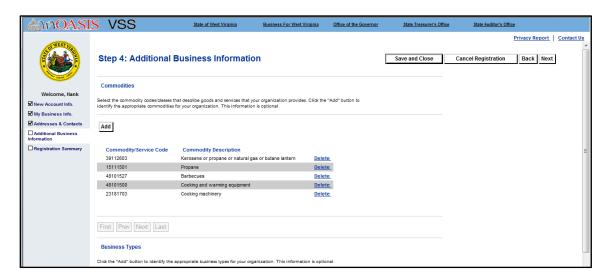
Here is an example of what the Addresses and Contacts page will look like if you answered "Yes" to all of the previous questions. Complete your address and contact information and then click the "Next" button. If you answered "No" to the second or third questions, then you will be transitioned to a series of pages to collect information for each of the address types.

Note: If you would prefer not to set up a billing address at this time, then uncheck the Billing checkbox at the top of the page before clicking "Next."



Step 3.9: The "Additional Business Information" page allows you to enter additional optional information about your company.

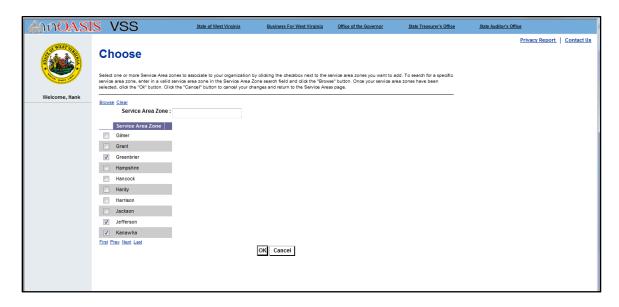
Commodities section: Click the "Add" button in this section to search for and select commodities that match the goods and services that your company is able to provide. Once you complete your selections, click "OK" to save your selections. NOTE: THIS IS NOT NEEDED IF YOU ARE APPLYING FOR A GRANT.



Business Type section: Click the "Add" button to search for and select business types that pertain to your business. Again, the user will select the appropriate entries and then click "OK" to save the selections. If you select the SWAM Business Type, then you also need to specify a value in the SWAM Type field. The Purchasing Division will populate the Certification Start Date and Certification End Date fields after verifying your SWAM type. The Status field is set to *Requested* until the certification has been verified.



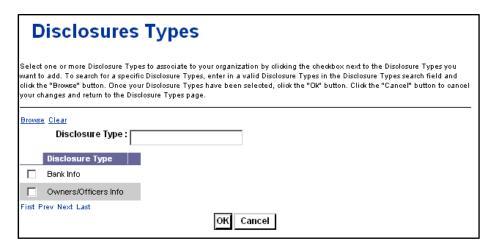
Service Areas Section: Click the "Add" button in this section to search for and select the specific geographic areas that your business is able to service. Click "OK" after selecting your areas in order to save your selections. NOTE: THIS IS NOT NEEDED IF YOU ARE APPLYING FOR A GRANT.



Disclosures Section: Click the "Add" button in this section to add Disclosure information for your business as required by *West Virginia Code* §5A-3-12. NOTE: THIS IS NOT NEEDED IF YOU ARE APPLYING FOR A GRANT.



Select the **Disclosure Type** and then select **OK**.



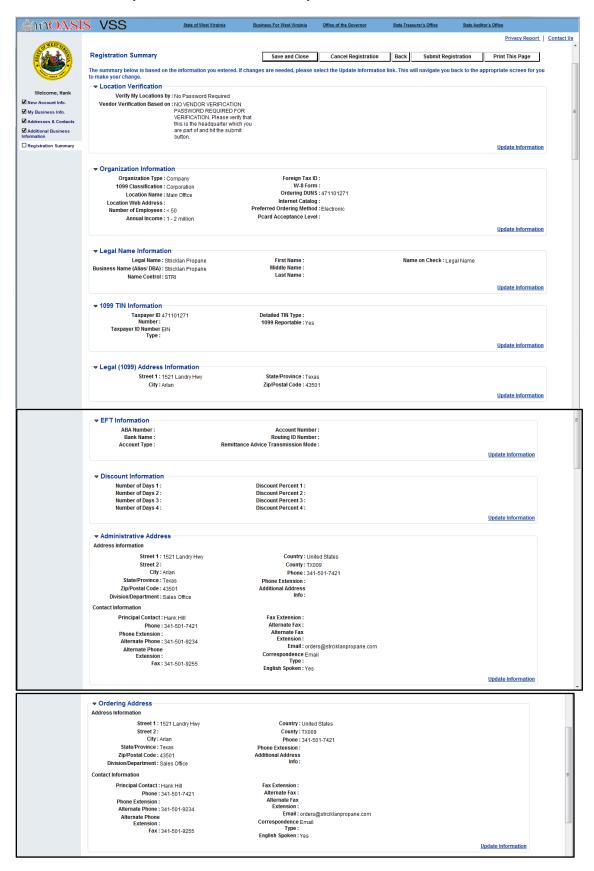
- If **Disclosure Type** is *Bank Reference Info*, please provide the Name, City, State and Phone Number for the bank.
- If **Disclosure Type** is *Owners/Officers Info*, please provide the Name, Position, City and State of Residence and the Phone Number for the owner/officer.
- If the vendor is an individual, his or her name and city and state of residence, and, if he or she has associates or partners sharing in his or her business, their names and city and state of residence are also required.
- If the vendor is a firm, the name and city and state of residence of each member, partner or associate of the firm is required.

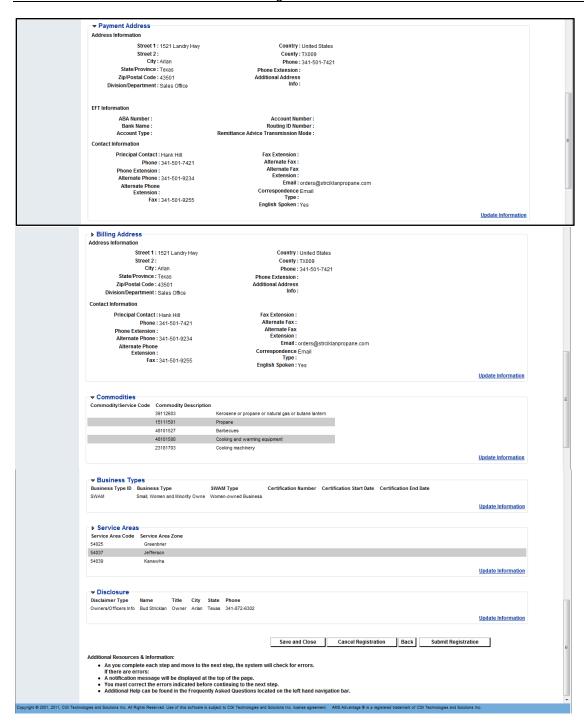
If the vendor is a corporation created under the laws of West Virginia or authorized to do business in West Virginia, the names and city and state of residence of the president, vice president, secretary, treasurer and general manager, if any, of the corporation; and the names and city and state of residence of each stockholder of the corporation owning or holding at least ten percent of the capital stock thereof are required.



Click "Next" at the bottom of the Additional Business Information page after you have selected your commodities, business types and/or service areas and have entered the required Disclosure information.

After you have completed the various sections, you will see the "Registration Summary" page. This page displays all of the information that you have entered thus far for your review.





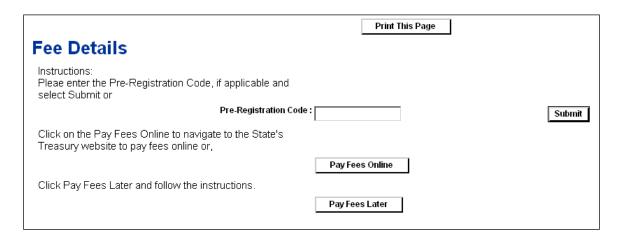
After you have reviewed the summary and confirm that everything is correct, click on the "Submit Registration" button located at the bottom of the page to continue.

If you determine that any of your information is incorrect, you can click the "Update Information" link in the appropriate section to navigate back and correct your information.

After selecting the "Submit Registration" button you are taken to the "Fee Details" page. On this page you must choose from one of three options:

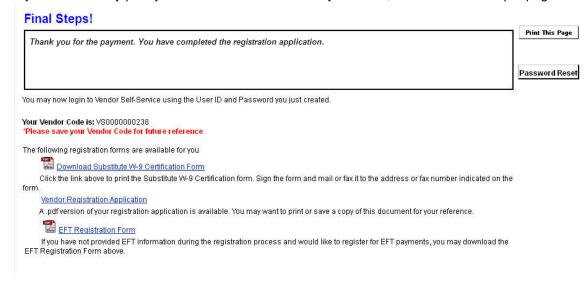
- Enter a Pre-Registration Code, if you received one from an agency. Select the Submit button, which takes you to the "Final Steps" page.
- Choose to pay the fee online. The "Pay Fee Online" button transitions you to the State Treasury web site. After paying the registration fee online, you are transitioned to the "Final Steps" page.

Choose to pay the fee later. The "Pay Fee Later" button transitions you to the "Final Steps" page. Grant applicants should choose the "Pay Fee Later" button. No fee is required for grant applicants.

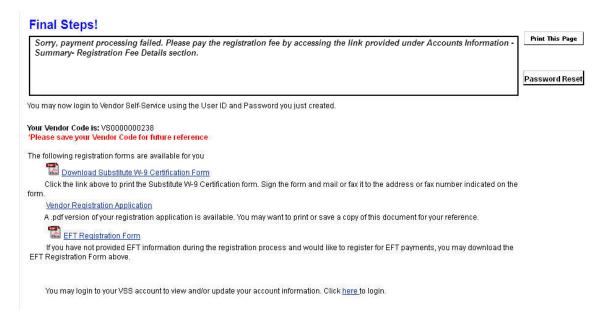


The message on the "Final Steps" page will vary based on the choice you made on the "Fee Details" page.

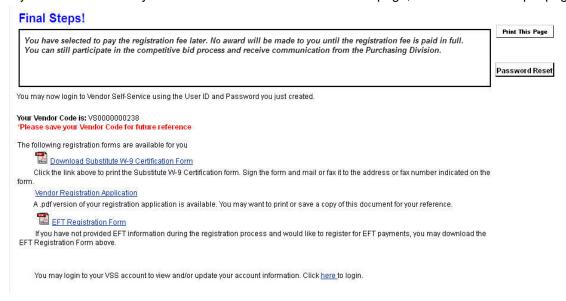
• If you successfully paid your fee on the State Treasury web site, then the "Final Steps" page will look like this:



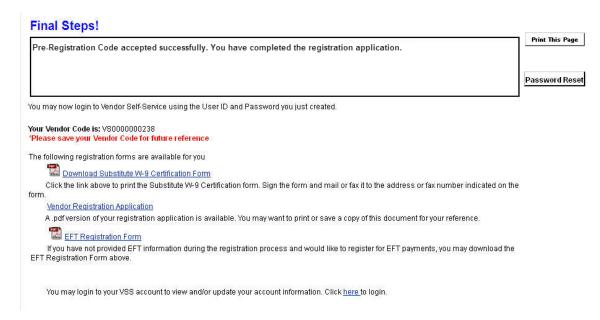
• If payment processing failed on the State Treasury web site, then the "Final Steps" page will look like this:



If you selected the "Pay Fee Later" action on the "Fee Details" page, then the "Final Steps" page will look like this:



• If you entered a Pre-Registration Code on the "Fee Details" page, then the "Final Steps" page will look like this:



You have now completed the registration application and can log in to VSS using your user ID and password (via the web site **www.wvoasis.gov**). Please note that your user ID and password are both case sensitive.